

INDUSTRY DESCRIPTION

The tourism industry provides amusement, recreation and travel services. The Missouri Division of Tourism has identified the following tourism-dependent industries: eating and drinking places (SIC-581); hotels and motels (SIC-701); rooming and boarding houses (SIC-702); camps and RV parks (SIC-703); organizational hotels (SIC-704); theatrical productions (SIC-792); commercial sports (SIC-794); physical fitness facilities (SIC-7991); public golf courses (SIC-7992); amusement parks (SIC-7996); other amusement and recreation services (SIC-7999); and botanical and zoological gardens (SIC-842).

TOURISM INDUSTRY MISSOURI INDICATORS, 1990-2000

	1990	2000	Percent Change
Total Employment	201,592	243,695	20.9%↑
Total Wages in Millions (2000 Dollars)	\$2,260.1	\$3,336.8	47.6%↑
Annual Wage Per Job (2000 Dollars)	\$11,205	\$13,692	22.3%↑
Total Establishments	10,693	12,348	15.5%↑

Source: Covered Employment & Wages, MO Economic Development

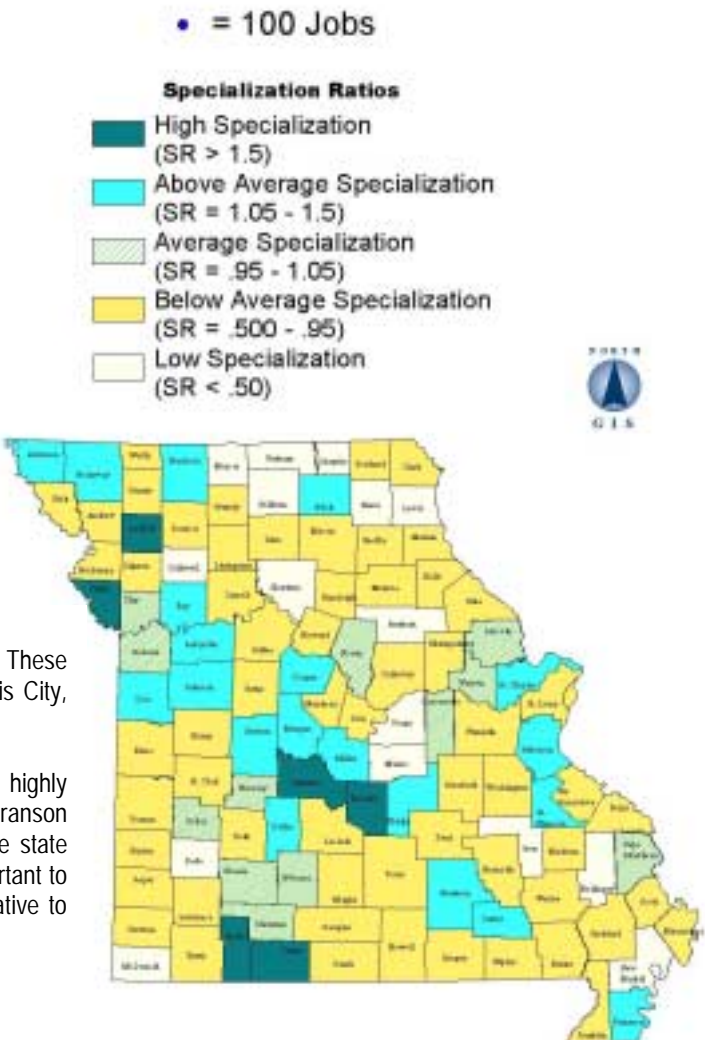


EMPLOYMENT AND SPECIALIZATION

In 2000, metropolitan areas had the largest number of tourism jobs. These included the counties of St. Louis, Jackson (Kansas City), St. Louis City, Greene (Springfield) and St. Charles.

According to specialization ratios (SRs), 6 Missouri counties were highly specialized in tourism employment. These areas were located in Branson and the Lake of the Ozarks. The most specialized counties in the state were Taney, Stone, Camden, Platte, DeKalb and Pulaski. It is important to note that SRs measure the proportion of industry employment relative to the state average, not the total number of jobs.

Source: Covered Employment & Wages, MO Economic Development



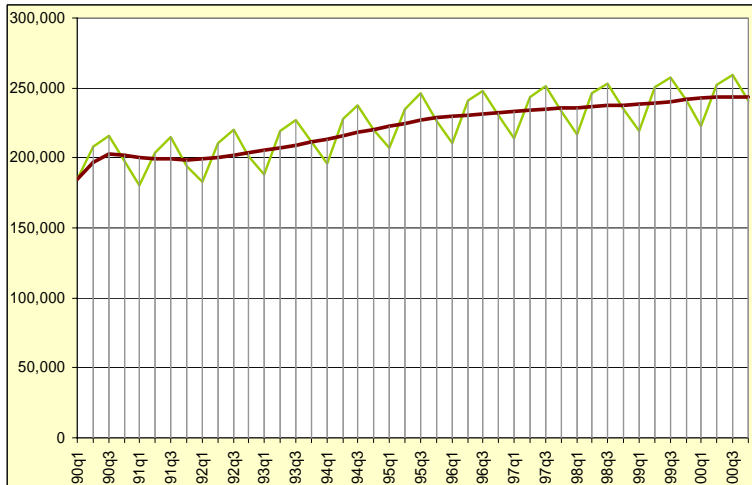
WHAT ARE SICs?

Standard Industrial Classifications (SICs) were developed to classify establishments by primary type of economic activity. The North American Industry Classification System (NAICS) will replace SICs by 2002.

WHY THE SWITCH TO NAICS?

The service sector has grown more important. New industries have emerged in the global economy. SICs needed comprehensive revision. Canada, Mexico & U.S. needed a common system.

EMPLOYMENT TRENDS, 1990-2000



- Tourism employment in Missouri has increased by 20.9% since 1990.
- The most current data estimates 243,695 tourism jobs during 2000 - accounting for 9.3% of all jobs statewide.
- Employment was highest during 3rd quarter 2000, with 259,093 jobs. Employment was lowest during 1st quarter 1991, with 180,004 jobs.

Red line represents four quarter rolling average.

Source: Covered Employment & Wages, MO Economic Development

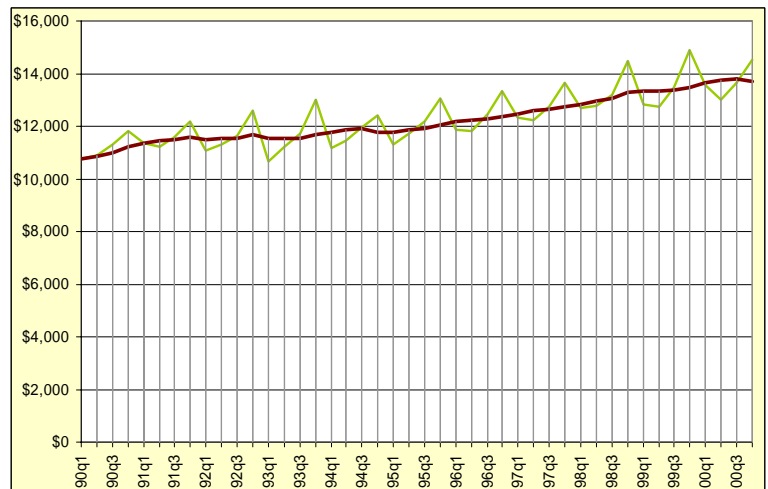
- Annual average wages per job in tourism has increased by 22.3% since 1990. Low annual wages in tourism indicate part-time and seasonal employment.
- The most current data estimates an average wage per job of \$13,692 during 2000 - much lower than the state average wage of \$31,217.
- Average wages per job were highest during 4th quarter 1999, at \$14,876 per job. Average wages per job were lowest during 1st quarter 1993, at \$10,681 per job.

Wages adjusted to 2000 real dollars. Quarter wages annualized.

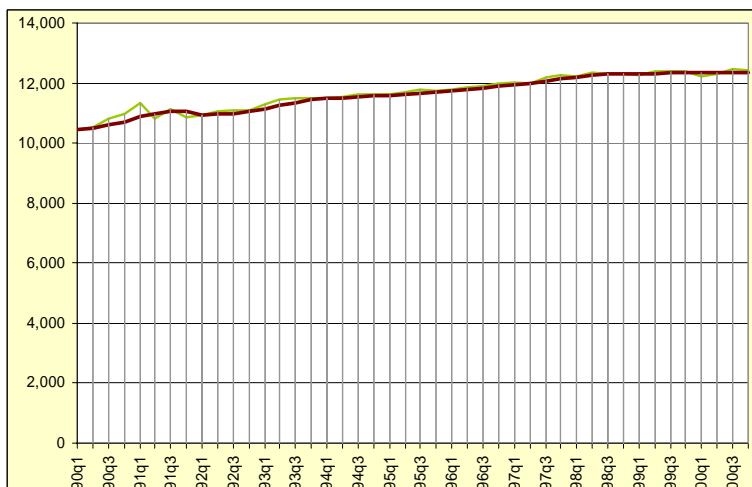
Red line represents four quarter rolling average.

Source: Covered Employment & Wages, MO Economic Development

ANNUAL AVERAGE WAGE PER JOB, 1990-2000



ESTABLISHMENT TRENDS, 1990-2000



- The number of tourism establishments in Missouri has increased by 15.5% since 1990.
- The most current data estimates 12,348 tourism establishments during 2000.
- Establishments were most numerous during 3rd quarter 2000, at 12,448 entities. Establishments were least numerous during 1st quarter 1990, at 10,459 entities.

Red line represents four quarter rolling average.

Source: Covered Employment & Wages, MO Economic Development